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COOPERATION BETWEEN INDUSTRY AND LABOR IN RETIREMENT EDUCATION, A PILOT PROJECT OF SCOVILL MANUFACTURING COMPANY AND UAW LOCAL 1604 IN WATERBURY, CONNECTICUT.

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THE SCOVILL MANUFACTURING COMPANY AND UAW LOCAL 1604 OF WATERBURY, CONNECTICUT JOINTLY SPONSORED A RETIREMENT EDUCATION PROGRAM FOR ALL EMPLOYEES OVER 55 YEARS OF AGE, TRAINING LEADERSHIP FROM MANAGEMENT AND THE UNION TO CONDUCT PROGRAMS ON COOPERATIVE BASIS. THIRTEEN DISCUSSION LEADERS AND 13 COMPANY AND COMMUNITY RESOURCE PERSONS TOOK PART IN THE LEADERSHIP TRAINING PROGRAM. A GROUP OF OLDER EMPLOYEES VOLUNTEERED TO TAKE PART IN THE DEMONSTRATIONS. THE TWO-WEEK TRAINING PROGRAM HAD FIVE PHASES--(1) ORIENTATION (BACKGROUND INFORMATION ON THE AGING PROCESS, PROGRAM OBJECTIVES), (2) DEMONSTRATION (RETIREMENT EDUCATION PROGRAM CONDUCTED BY AN EXPERIENCED LEADER EVALUATED BY TRAINEES), (3) PRACTICE (LEADERS IN TRAINING CONDUCTED DISCUSSIONS IDENTICAL TO THE DEMONSTRATION), (4) PROGRAM DEVELOPMENT (PLANNING FUTURE PROGRAMS), AND (5) EVALUATION (PRE- AND POST-TRAINING QUESTIONNAIRES TO ASSESS TRAINING RESULTS). IMMEDIATELY FOLLOWING THE TRAINING PROJECT, SIX LEADERSHIP TEAMS LAUNCHED THEIR FIRST PROGRAMS AND COMPLETED 12 EIGHT-WEEK PROGRAMS FOR 100 OLDER EMPLOYEES AND THEIR SPOUSES. (APPENDIXES ARE ROSTERS, TRAINING SCHEDULE, COMMITTEE WORK SHEETS, AND THE EVALUATION QUESTIONNAIRES.) (AJ)

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COOPERATION BETWEEN INDUSTRY AND LABOR IN RETIREMENT EDUCATION

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[redacted]

A Pilot Project of Scovill Manufacturing
Company and UAW Local 1604 in Waterbury, Connecticut.

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Division of Gerontology
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Foreword

Cooperation has become a lively issue in all modern-day economic, social, and political relationships. In any event, one hears a great deal nowadays about the benefits of cooperation, and, as a matter of fact, a new kind of social science is being developed which concerns itself with relationships of people in groups and with conditions which encourage or discourage cooperation between people, organizations, and nations.

Although in this project the primary objective of Scovill Manufacturing Company and UAW Local 1604 of Waterbury, Connecticut, was to train discussion leaders for retirement education programs, the project was also intended to create the basis for the Company and the Union to develop and conduct programs on a cooperative basis. The record shows that to a considerable degree both of these objectives were realized. It will surprise no one that people were the most important element in making initial successes possible.

J. Milton Burrall, Director, Employee Relations, Scovill Manufacturing Company; Ralph Daddesio, President, UAW Local 1604; John W. Moore, Manager, Labor Relations, Scovill Manufacturing Company; and Frank Santaguida, International Representative, Older and Retired Workers Department, UAW, members of the Scovill-UAW Human Relations Committee, deserve credit for the success of the program along with Rocco J. Palladino, Executive Director, Waterbury Area Retired Workers Council, and Charles Rietdyke, Assistant to the Director, Employee Relations, Scovill Manufacturing Company, coordinators for the program, and Charles E. Odell, Director, Older and Retired Workers Department, United Auto Workers (AFL-CIO), who served as consultant throughout the project.

These, then, are the men who deserve primary credit for getting the program underway but there are a good many others who deserve special recognition for their contributions to the training program and for their help as resource persons

in the retirement education programs including Myrtle Babcock, Executive Director, Waterbury Nutrition Council; Robert W. Butler, M.D., Director, Medical Services, Scovill Manufacturing Company; James J. Donahue, Executive Director, Waterbury Housing Authority; Thomas Hogenauer, Manager, Connecticut State Employment Service, and his associate, Ruth Mitkowsky; James E. Moran, Assistant Superintendent, Waterbury Department of Education; Geraldine Novotny, University of Connecticut; Genevieve Ramsey, Assistant Librarian, Silas Bronson Library; Henry J. Tiedemann, Jr., District Manager, Social Security Administration, and his associates, C. Anthony Marafino and Michael Giacondino; and Fred W. Wilson, Manager, Employee Activities, Scovill Manufacturing Company.

The training program could not have provided the same learning experiences had not two groups of Scovill employees participated in demonstration programs. Their enthusiastic cooperation made it easy to observe firsthand retirement education programs in action. Rocco J. Palladino and members of a Waterbury Area Retired Workers Council Center also made it possible to study an activity center program for older people.

Rarely has there been the opportunity to work with a more dedicated group of people than those from management, union, and the community who took part in the Scovill-UAW retirement education training project. Their willingness to work long hours in order to learn how to conduct retirement education programs will not readily be matched. At this writing they have completed 8-week programs for 12 different groups of Scovill employees with considerable success.

Finally, a project of this sort could not have been achieved without the encouragement and full endorsement of Malcolm Baldrige, President, Scovill Manufacturing Company, and Walter Reuther, President, United Auto Workers (AFL-CIO).

Woodrow W. Hunter, Training Program Leader
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Ann Arbor, Michigan
March, 1965

I. INTRODUCTION

The Scovill-UAW Innovation

Although retirement education was conceived and offered originally in a university setting, it is now offered in many settings including public school adult education departments, university extension services, libraries, YMCA's, churches, governmental agencies, labor unions, and industries. In fact, sponsorship has become so diverse in the past 15 years since the first program was offered at a Midwest university that questions have been raised about responsibility for educating adults for the retirement years. Is it industry's responsibility? Is it public education's responsibility? Is it labor's responsibility? Whose responsibility is it?

Some observers contend that it makes little difference how many or what kinds of organizations do the job as long as the job gets done. But this is the problem: the job is not being done in many communities; and, often, the quality of the programs being offered leaves something to be desired.

For these and other reasons the position has been taken that primary responsibility for retirement education rests with public educational institutions and that public education should seek the closest cooperation and assistance from other agencies in the community. For some time, now, it has also been recognized that considerable impetus might be generated were management and labor cooperatively to take the initiative in a community and encourage other agencies including public education to become involved. However, there have been no substantial attempts to realize this objective, that is, until the Scovill Manufacturing Company and UAW Local 1604 of Waterbury, Connecticut, made the decision to sponsor jointly a retirement education program for all Scovill employees 55 years of age and older. Moreover, the Scovill-UAW program, to the extent that it trained its

own leadership from management and union to conduct programs on a cooperative basis, is truly an innovation in American retirement education.

The purpose of this report is to trace the beginnings of the Scovill-UAW innovation and to describe its development in enough detail to permit its replication by other interested groups.

Important Beginnings

Certainly, the foremost contingency in the realization of a cooperative project of this or any other kind is that the parties involved have respect for each other and want to cooperate. The record shows that for some time the labor relations climate at Scovill has been conducive to cooperation rather than conflict. In addition, during contract negotiations in 1963 a Human Relations Committee comprised of representation from management and labor was created to facilitate discussion of topics of mutual interest away from the bargaining table. The question of management-labor cooperation in a retirement education program was among the first projects to be considered by the Human Relations Committee.

To help develop the first Scovill-UAW program the Human Relations Committee turned to Charles Odell and the Older and Retired Workers Department of United Auto Workers (AFL-CIO) for advice and information and in conjunction with the Department made the following basic decisions before initiating the program:

1. that expenses of the programs would be shared jointly by the Company and the Union;
2. that leadership teams made up of company and union personnel would be trained by the Division of Gerontology of The University of Michigan to conduct Scovill-UAW programs;
3. that The University of Michigan preparation for retirement program and materials would be used;
4. that all Scovill employees 55 years of age and older, salaried and hourly-rated, and their spouses would be eligible for the program;

5. that employee participation would be on a voluntary basis;
6. that the program would be offered one-half on company time and one-half on the employee's time;
7. that leaders from various community groups including public school adult education, public library, social security, public employment service, public health, and public housing would be invited to participate in as much of the leadership team training program as possible to familiarize them with the program and to facilitate their participation as resource persons in subsequent programs;
8. that the jointly sponsored Scovill-UAW retirement education program would be titled "Looking Forward to Retirement;"
9. that all levels of leadership in the Union and in the Company would be made fully aware of the objectives and methods of the program and encouraged to help promote it among older employees.

Having made these decisions, the Committee turned its attention to promoting the program and to assessing reactions to it. The higher echelons of management and labor were represented on the Human Relations Committee and, accordingly, were well informed from the beginning. There remained, however, the important task of bringing together leaders from the community and foremen and stewards and inviting them to share the task of promoting the program. The Committee also brought together representatives from the local press, radio, and television and made arrangements to have them publicize various aspects of the program including a mass meeting of all interested employees for purposes of finding out about the program and indicating their desire to participate. The mass meeting was attended by 350 employees and their spouses, approximately half of all Scovill employees 55 years of age and older employed in the Waterbury plants. Personal invitations sent to the homes of all employees 55 years of age and older, 4' x 8' posters displayed in the plants, articles in the Scovill Bulletin, the endorsement

of the program by union and company leaders, outstanding coverage by local mass media, and personal contacts by foremen and stewards undoubtedly played a part in developing the unusual amount of employee interest that was shown.

A large proportion of the 350 employees and their spouses who attended the mass meeting were enthusiastic about the program and indicated their desire to participate. Employees who could not attend the mass meeting also made their interest known. Thus, following the exploratory meeting there was very little question about employee reaction and plans were made immediately to conduct the leadership training program.[1]

II. THE LEADERSHIP TEAM TRAINING PROGRAM

Participants in the training program were of two kinds: 1) prospective discussion leaders from management and labor who following the training program agreed to conduct retirement education programs (see Appendix A) and 2) older Scovill employees who volunteered to take part in demonstration and practice programs so that those in training could observe and practice leadership skills required to offer programs.[2]

Characteristics of Leaders in Training

The thirteen discussion leaders who were selected for training, six from management and seven from the union, ranged in age from 36 to 62 years of age. There was only one woman among them. In addition, thirteen leaders from the community and two others from the Company took part in various aspects of the training

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[1] See Scovill Manufacturing Company and UAW Local 1604, "Looking Forward to Retirement," Waterbury, Connecticut: The Company and Union, 1964. This is an excellent pictorial presentation of the various steps taken in the initial development of the program.

[2] More will be said about the demonstration and practice groups in the section on training methods. The demonstration program was conducted by an experienced leader while the leaders in training observed and criticized. The practice program was conducted by the leaders in training while the staff and other leaders observed and evaluated.

project in order to learn their roles as resource persons but their participation, of necessity, was not as intensive as that of the Company and Union discussion leaders (see Appendix B). There were eight men and five women among the community and Company resource persons. Altogether, then, there were twenty-six persons who took part in the leadership training program.

The positions which the twenty-six leaders from the Company, Union, and community occupied are shown in Table 1. The listing of positions shows the

Table 1. Positions of Company and Union Leaders and of Resource Persons

Company Leaders (n-6)	Union Leaders (n-7)	Resource Persons (n-13)
Director, Employee Relations	President, Local Union	Executive Director, Housing Authority, City of Waterbury
Manager, Labor Relations	International Representative, UAW	Manager and one Associate, Connecticut State Employment Service
Social Worker, Employee Relations	President, Retired Workers Council	Assistant Librarian, Silas Bronson Library, Waterbury
Assistant to Director, Employee Relations	Executive Director, Retired Workers Council	District Manager and two Associates, Social Security Administration Office, Waterbury
Assistant Employment Manager, Employee Relations	Board Member, Retired Workers Council	Assistant Superintendent, Waterbury Department of Education
Supervisor, Labor Relations and Safety	Union Member, Pension Review Board	Executive Director, Waterbury Nutrition Council
	Member, Local Union	Supervisor, Waterbury Visiting Nurses Association
		Gerontologist, University of Connecticut
		Director, Medical Services, Scovill Manufacturing Co.
		Manager, Employee Activities, Scovill Manufacturing Co.

outstanding leadership which the Company, the Union, and the community made available for a cooperative Scovill-UAW retirement education program.

Characteristics of Older Employees in Pilot Programs

The other important participants in the leadership team training program were the older Scovill employees who volunteered to take part in the demonstration and practice retirement education programs, and thereby give the leaders in training opportunity to observe and practice program skills. One contribution of the pilot groups to the ongoing program was not anticipated, namely, their enthusiastic support and promotion of the program among other employees.

Characteristics of the participants in the demonstration and the practice programs are shown in Table 2. The two groups were similar in most respects

Table 2. Characteristics of Older Employee Participants

Characteristics	Demonstration Group (n-15)	Practice Group (n-14)	Both Groups[a] (n-29)
Sex			
Male	10	12	22
Female	5	2	7
Age			
50 - 54	-	1	1
55 - 59	6	5	11
60 - 64	8	8	16
65 - 69	1	-	1
Marital status			
Single	3	-	3
Married	9	13	22
Widowed	2	1	3
Divorced or separated	1	-	1
Place of birth			
United States	13	8	21
Foreign country			
Non-English speaking	2	2	4
English speaking	-	4	4
Years of school completed			
8 or less (elementary)	10	8	18
9 - 12 (high school)	2	5	7
13 or more (college)	3	1	4
Median years of school completed	8	8	8
Years remaining before retirement			
Less than one year	-	1	1
One or two years	2	4	6
Three or four years	4	-	4
Five or six years	3	1	4
Undecided	6	8	14

[a]All but four were full-time employees of Scovill Manufacturing Company. One of the men was on leave from his job and three of the women were housewives who participated in the program with their husbands.

including their age and sex composition, marital status, place of birth, and years of school completed. There was more occupational diversity, however, in the demonstration than in the practice group (see Appendix C), and the demonstration group appeared to be somewhat further away from retirement than the practice group. Approximately half of each group had not decided about a retirement date.

Training Objectives

The primary objective of the two-week training program was to develop leadership for retirement education programs which were to be offered to all employees of Scovill Manufacturing Company at Waterbury, Connecticut. However, in order to conduct the programs on a cooperative basis it was decided more specifically to train leadership teams made up of company and union personnel. A goal was established of training a minimum of six leadership teams, each team made up of one person from management and one person from labor. The need for as many as six leadership teams to conduct programs was underscored by the fact that there were approximately 1,000 employees in the Waterbury divisions of Scovill who were 55 years of age and older and eligible for the program.

Content and Methods

The two-week training program was divided into several phases--1) orientation, 2) demonstration, 3) practice, 4) program development, and 5) training evaluation (see Appendix D):

The Orientation Phase. During the first two days efforts were concentrated on presenting background information about the meaning of work and retirement, the social, psychological and physical aspects of aging, and the relation of the older individual to the community in which he lives. The orientation phase also included a series of presentations related specifically to the practical aspects of planning and conducting preretirement education programs. For the most part the orientation phase depended upon the lecture

method. However, time was scheduled for group discussion following the presentations, and leaders in training were encouraged to develop some preliminary guidelines for program development based on the presentations and discussions.

The orientation phase was also concerned with increasing an understanding of objectives, with developing an organization and ground rules for the training program, with giving participants the opportunity to select specific assignments, and with encouraging the maximum amount of cooperation between the leaders in training. Arrangements were made for the training group and staff to eat lunch together each day so that additional time was available for special events of significance to the over-all training objective such as orientation of resource persons, reports to company and union officials, community leaders, and persons representing the press, radio, and television, and preparation of a local television presentation covering the training program.

The Demonstration Phase. Following the orientation phase six days were devoted to demonstration and practice phases. During the morning of each of the six days the staff conducted a demonstration program with a group of Scovill employees on the following topics (see Appendix E):

a. Work and Retirement--An Introduction to the Program
b. Physical and Mental Health
c. Family, Friends, and Living Arrangements
d. Financial Planning
e. Legal Affairs of Older People
f. The Good Use of Leisure Time and Summary

While the demonstration program was being conducted the leaders in training served on one of three committees in order to observe and evaluate various aspects of the program:

a. Arrangements Committee. Members of this committee assisted the discussion leader for the demonstration program by arranging the meeting

room, setting up and operating projection equipment, serving refreshments, helping the older people become better acquainted; and they observed and evaluated these kinds of factors in relation to the reactions of the participants and the progress of the program.

b. Leadership and Member Participation Committee. Members of this committee were responsible for observing and evaluating the discussion leader and resource persons and the techniques they employed to promote learning, group discussion, and decision-making. The quantity and quality of participation by the older people in the demonstration program were also assessed by members of this committee.

c. Program Materials Committee. In conducting the demonstration a variety of reading and visual materials was used. The function of the program materials committee was to scrutinize all materials carefully beforehand and to evaluate their effectiveness during the program.

Following each session of the demonstration program the three committees were given time to discuss their observations and prepare a verbal report for presentation to the training group as a whole. Outlines were issued to each committee to guide development of observational and reporting plans and procedures (see Appendices F, G, H).

In sum, therefore, the six-session demonstration program provided the opportunity to learn by observing and evaluating a retirement education program conducted by an experienced leader.

The Practice Phase. During the afternoon of each of these six days leaders in training took responsibility for conducting an identical group discussion retirement education program with a different group of Scovill employees. Responsibility for the practice sessions was assumed jointly by a leadership

team made up of representatives from the Company and the Union. In all sessions, however, one of the team members served as the discussion leader while the other member of the team helped to plan the meeting, make necessary arrangements, or served as a resource person for the discussion. During the practice phase the staff observed and evaluated the performance of the leaders in training. Moreover, the leaders who were not assigned to conduct the practice sessions were members of the three observational committees mentioned earlier and, thus, augmented their own learning and the observations and evaluations of the staff.

The Program Development Phase. As will be noted in Appendix D, this phase of the training took place on the last two days of the program. It was designed primarily to provide full opportunity to develop guidelines and plans for promoting future programs for Scovill employees, and included such things as making a careful review of specific plans of leaders for each session of the retirement education program, determining future needs for program materials, supplies, and equipment, reviewing applications of older employees to participate in programs, determining a schedule for future programs, assigning members to leadership teams, and reporting requirements of future programs to company, union, and community groups.

The Evaluation Phase. The final afternoon of the training program consisted of efforts to evaluate results. "Before" and "after" questionnaires were administered to assess training results, but before we discuss results of the training evaluation let us summarize some of the more important aspects of the training program.

Some Conclusions

Those aspects of the training program which impressed the leaders in training as much as anything else were the opportunity to observe and evaluate a program

in action and to practice various leadership skills. However, to be effective teaching devices and to minimize any adverse effects of having as many as twelve observers in the same room as the discussion group, the demonstration and practice phases require careful planning and execution. Here, then, are some of the more important considerations:

1. Selection of Demonstration Groups. The Scovill-UAW leadership team training project was based on two different pilot groups, one for the demonstration and the other for the practice program. In other training projects the same group has been used for the demonstration and the practice programs. Each approach has its advantages and disadvantages.

   When the same group is used one reduces the work required to secure cooperation of two groups of older people in a retirement education program, and discussion leaders in training have fewer unknowns to face when it comes their turn to perform.

   The use of different groups, on the other hand, introduces new and different leadership situations and enriches the learning experience. One of the major disadvantages when using different groups arises from the feeling that the practice group has been "short-changed" on leadership.

2. Orientation of the Demonstration Groups. Although the demonstration and practice aspects of the program should be mentioned when persons are being invited to participate in the pilot programs, there appears to be no need to describe these aspects of the program in any detail. At the first meeting of the retirement education program, however, the leader must be prepared to explain the demonstration situation more fully and to encourage its acceptance by emphasizing the benefits which will accrue as additional leaders are trained. It usually helps, also, to state clearly that the leaders in training are expected to observe but not to enter into the discussion.

3. Orientation of Leaders in Training. The leaders will profit from careful instruction on what and how to observe in a discussion group, and if they can be given some practice ahead of time so much the better. In addition, experience shows that movement in and out of the room, gestures, laughing, whispering, talking, and passing of papers should be kept to a minimum. To be on the safe side observers should be in their seats before the meeting, and they should keep from interacting with the group during the discussion, the break period, and after the discussion.

4. Physical Arrangements. There appears to be no need to isolate the observers at any great distance from the discussion group as long as the observers maintain quiet and make no effort to interact with members of the discussion group. To maximize opportunity to observe facial expression, to hear what is said, and to assess interaction, observers should be arranged in a circle surrounding the discussion group but far enough away from the discussion group to forestall any tendency for the "inner" group to include the "outer" group in its deliberations. Obviously it takes a good-sized room to make possible ideal arrangements of these kinds.

5. Transition in Leadership. Having stressed the importance of a minimum of interaction between observers and participants, the stage is reached when observers change their role to that of discussion leaders. As might be expected, groups differ in their tolerance for new and different discussion leaders. Some of them resent the change and are quick to express their disapproval. Other groups take the change in their stride and even help the new leader over some of the more difficult times in the discussion. In any event, most groups accept the change if the training project director is on hand to smooth over the various transitions in leadership and to assist the leader in training if it appears that he

cannot by himself handle a situation. Assistance must be given, however, in such a manner that the leader in training is not embarrassed.

6. Leader Participation. Active participation of the discussion leaders in all phases of the project was considered the primary prerequisite of a successful training program especially because the major goal of the training was to make possible effective teamwork for future programs. Accordingly, the leaders were given the opportunity on the first day of the project to discuss and revise training plans. Thereafter during the various phases of the training the leaders were given primary responsibility for evaluating everything that transpired including their own performances.

In addition, some of the leaders had the opportunity to plan and take part in a local television program and all of them took part in a field trip for purposes of evaluating an activity center program for older people in Waterbury (see Appendix I).

III. RESULTS OF THE LEADERSHIP TRAINING PROGRAM

Expectations of the Training Group

The first morning of the training program, before anything else had been done, the leaders were asked to fill out a questionnaire which among other things asked them to list the benefits they expected to derive from participation in the training program (see Part I, Item 8, Appendix J). Table 3 summarizes their responses and shows that everyone was concerned with learning how to conduct a retirement education program and, in addition, all but three of the leaders wanted to acquire a better understanding of older people and their problems. It is quite possible that these particular two objectives were closely related in the minds of the leaders.

Table 3. Anticipated Benefits From the Leadership Team Training Program.

Kinds of Benefits	Number of Times Mentioned (n-13)
To learn how to conduct a retirement education program	13
To understand older people and their problems better	10
To achieve closer working relationships between management and union	3
To increase my knowledge in general	3
To help me prepare for my own retirement	1
To acquire a better knowledge of community resources	1
Total	31

Reactions to the Training

A post-training program questionnaire was administered during the final phase of the project and leaders in training were asked to react to several aspects of the training program (see Part I, Items 4 through 15, Appendix K). First, as indicated in Table 4, the leaders were asked to list things which they liked most

Table 4. Things Which the Leaders Liked Most About the Training Program.

Things Liked Most	Number of Times Mentioned (n-13)
The friendly and cooperative atmosphere during the training program	6
"feeling of warmth and friendship shown by all"	
"enthusiasm and cooperation of all concerned"	
"the emphasis on teamwork and cooperation"	
"the easy give and take of the trainees"	
"the way people cooperated"	
"the opportunity it provided for association and working together"	
Interest and participation of the leaders in training	4
"sincere interest of participants"	
"I enjoyed the active group participation"	
"the outstanding manner in which the group took part in the discussion"	
"the leaders' interest and participation"	

(Table 4 continued on next page.)

Table 4. (cont'd)

Things Liked Most	Number of Times Mentioned (n-13)
The kinds and amounts of information	2
The opportunity to evaluate a "live" program	2
The program opened up a new field and challenge	1
The opportunity to learn firsthand what retirement means to people	1
The satisfaction of seeing the program take shape	1
The opportunity for each of us to develop our own style	1
The performance of the resource people	1
Total	19

about the training project, and in view of training objectives it is especially interesting to see that all but three of the leaders emphasized the friendly or cooperative atmosphere which prevailed during the training project and the interest and participation of the leaders in training. Presumably these two results are interrelated.

Table 5 shows what it was the leaders liked least about the program. Leaders mentioned the lack of time to cover the various aspects of the program

Table 5. Things Which the Leaders Liked Least About the Training Program.

Things Liked Least	Number of Times Mentioned (n-13)
The lack of time	7
The redundancy of some observational committee reports	1
The lack of definite guidance at times	1
Disliked nothing	5
Total	14

more often than any other dislike and, accordingly, as shown in Table 6, additional time was suggested more often than anything else to improve the training program.

Table 6. Things Which the Leaders Suggested to Improve the Training.

Suggestions for Improving the Training	Number of Times Mentioned (n-13)
Allow more time for the program	6
Give leaders more training	3
Prepare a directory of community resources for use of leaders and older people	1
Review and evaluate the program after everyone has served as a leader	1
Orient resource people better	1
Streamline the material	1
Make greater use of visual aids	1
Encourage greater participation of older people	1
Total	15

The leaders were also asked to indicate in what ways participation in the training program gave them a better understanding of older people and retirement (see Part I, Items 8 and 9, Appendix K). In this respect almost everyone had something to say. Here, then, are some of their comments:

"I became aware of their (older people) problems and attitudes."

"I learned new information about older people."

"I heard firsthand how older people feel about retirement."

"I feel a closer relationship to older people and their problems."

"I found out older people can be interesting."

"I was amazed at their willingness to talk over their problems."

"I realized I am growing older too."

A great deal of retirement education material was made available for the leaders to read and study. Two of the leaders said they read all of it; seven,

about half of it; and four, some but not half of it. All of the leaders reported they wanted to use the material in retirement education programs they planned to offer. In general, the leaders endorsed the training by saying that they thought the time was well spent. However, all but one of the leaders said they hoped to have additional follow-up training. Thus, there are plans upon completion of the first cycle of preretirement education programs to evaluate results and offer whatever additional training is needed.

Self-Evaluation of Leadership Skills

The training program provided the opportunity to observe and, more importantly, to practice a number of leadership skills which, it was assumed, are required to plan, organize, conduct, and evaluate retirement education programs. Table 7 summarizes these skills and the leaders' self-estimate of proficiency in

Table 7. Self-estimate of Proficiency in Leadership Skills for Retirement Education Programs.

Item No.[a]	Types of Leadership Skills for Retirement Education Programs	Number and Kinds of Responses (n-13)						Increase in the Number of "Agree" Responses
		Before			After			
		Agree[b]	Uncertain	Disagree[c]	Agree[b]	Uncertain	Disagree[c]	
	Program Organization							
1	Plan and organize a program	10[d]	3	0	10	3	0	d
2	Promote attendance of older people	7	6	0	11	2	0	4
6	Develop the content of a program	9	4	0	13	0	0	4
14	Promote support for the program	11	2	0	13	0	0	2
	Program Methods							
8	Stimulate group discussion	11	2	0	13	0	0	2
9	Adapt materials	3	9	1	13	0	0	10
10	Obtain additional materials as needed	6	5	2	12	1	0	6

(Table 7 continued on next page.)

Table 7. (cont'd)

Item No.[a]	Types of Leadership Skills for Retirement Education Programs	Number and Kinds of Responses (n-13)						Increase in the Number of "Agree" Responses
		Before			After			
		Agree[b]	Uncertain	Disagree[c]	Agree[b]	Uncertain	Disagree[c]	
11	Arrange physical facilities	7	6	0	13	0	0	6
12	Identify and use resource people	11	2	0	13	0	0	2
15	Use visual aids	4	7	2	13	0	0	9
16	Use retired workers as resource people	8	4	1	9	4	0	1
17	Use role-playing technique	8	3	2	9	4	0	1
18	Maintain attendance	4	6	3	11	2	0	7
19	Use exhibit technique	3	8	2	11	2	0	8
	Program Evaluation							
3	Discriminate between good and poor program leadership	11	2	0	13	0	0	2
7	Judge success or failure of a group discussion meeting	12	1	0	12	1	0	0
20	Evaluate results of a program	2	6	5	9	4	0	7

[a]See Part II of Appendix K: Postworkshop Questionnaire.

[b]"Strongly Agree" and "Agree" were combined.

[c]"Strongly Disagree" and "Disagree" were combined.

[d]Five of these persons changed from "Agree" on the pre-test to "Strongly Agree" on the post-test.

them at the beginning and again upon completion of the training program. In all instances, leaders' estimates changed in the desired direction. There was, however, greater improvement in skills associated with program methods than with skills associated with program organization and program evaluation.

Readiness of Leaders to Develop Programs

Several items of the pre- and the post-training questionnaires were designed to determine whether the students thought themselves prepared to conduct retirement

education programs and whether they intended, in fact, to do so. Table 8 presents these items and the leaders' responses to them. Responses to item 4 show the

Table 8. Readiness of Students to Develop Programs

Item No.[a]	Attitudes Toward Programs	Number and Kinds of Responses (n-13)						Increase in the Number of "Agree" Responses
		Before			After			
		Agree[b]	Uncertain	Disagree[c]	Agree[b]	Uncertain	Disagree[c]	
4	(Preworkshop) Expects to be a better discussion leader	13	0	0				
4	(Postworkshop) Considers himself a better discussion leader				13	0	0	0
5	Feels adequately prepared to serve as discussion leader	4	5	4	11	2	0	7
13	Thinks organization (or community) should develop program	13	0	0	13	0	0	0
21	Intends to encourage organization (or community) to offer a program	10	3	0	11	1	1	1
22	Intends to serve as a discussion leader in a program	11	1	1	11	2	0	0

[a]See Part II of Appendix K: Postworkshop Questionnaire.

[b]"Strongly Agree" and "Agree" were combined.

[c]"Strongly Disagree" and "Disagree" were combined.

leaders expected the training program to make them better discussion leaders for a retirement education program and that the training program did, as a matter of fact, improve their skills. Table 8, item 5, also shows whereas only four of the leaders felt adequately prepared initially to conduct a discussion program, 11 of them felt adequately prepared after taking part in the training.

IV. SPECIAL CONSIDERATIONS

The training program appears to have achieved a number of worthwhile results: almost all of the leaders from company and union felt confident in their ability to serve as discussion leaders and together with a number of community and company resource persons they appeared to have worked out effective cooperative roles for retirement education programs. Immediately following the training project six leadership teams launched their first programs, and in a few months' time they had completed a total of 12 8-week programs for approximately 100 older employees and their spouses. The initiation and successful completion of programs is probably as good a test of the effectiveness of the training project as anything else.

Despite these gains it was agreed that much more must be done to realize a total community approach to retirement education in Waterbury, Connecticut. At the present time the major responsibility has been assumed by a labor union and a company to offer a program only to their own constituents. During the course of the training project, however, the Assistant Superintendent of Schools stated he was willing to make an investment in the program, especially if this would mean that anyone interested in retirement education would have the opportunity to participate.

Everyone agreed that more time should have been devoted during the training program to reading and study, and to additional discussion of retirement education methods. It was also generally agreed that the number of consecutive hours spent in training each day should have been reduced. To achieve training objectives in a two-week period, it was necessary to commence training at eight-thirty in the morning and for some people to continue training uninterruptedly until nine or ten o'clock in the evening. Under these circumstances an intervening weekend for rest and relaxation was extremely important.

Having the noonday meal together, although not planned originally as part of the training program, yielded many benefits including the opportunity for everyone to become better acquainted, to discuss progress with company, union, and community leaders who were not directly involved in the project, to brief community leaders who were to take part as resource people in the program, to prepare publicity for the press, and to develop a script for a local television show. Of all these benefits, however, the most impressive one was the cooperation and friendliness which the luncheon hour promoted.

Finally, the group decided that as soon as everyone has had experience as a discussion leader in a retirement education program, there should be a somewhat shorter review and evaluation session. In the meantime, plans were made for the co-discussion leaders on the leadership teams to help the discussion leader assess each session and make appropriate changes during the program.

Having invested so much of their time and energy in a training program, participants from the Company, the Union, and the Community have good reason to feel a great deal of pride in having launched a quality retirement education program for Scovill employees. They also have good reason to feel pride in having pioneered a cooperative approach to retirement education. Hopefully, their achievements will serve as a model for further developments in Waterbury and in other communities where questions are arising about responsibility for preparation for retirement.

Appendix A

DISCUSSION LEADERS

From the Company (n-6)

Joseph F. Burke
Assistant Employment Manager

J. Milton Burrall
Director, Employee Relations

John T. Fogarty, Supervisor
Labor Relations and Safety
Mills Division

Marie S. Hayes
Social Worker, Employee Relations

John W. Moore
Manager, Labor Relations

Charles Rietdyke
Assistant to Director
Employee Relations

From the Union (n-7)

Lawrence Bernier
Board Member, Waterbury Area
Retired Workers Council;
Member, UAW Local 1604

Anthony J. Conti
President, Waterbury Area
Retired Workers Council;
Member, UAW Local 1604

Ralph E. Daddesio
President, UAW Local 1604

Herbert Eastwood
Member, UAW Local 1604

Rocco Palladino
Executive Director
Waterbury Area Retired Workers
Council

J. Arthur Rompre
Member, Pension Review Board
UAW Local 1604

Frank Santaguida
International Representative
Older and Retired Workers
Department, UAW

Appendix B

RESOURCE PERSONS

Robert W. Butler, M.D., Director, Medical Services, Scovill Manufacturing Company

Loretta Wilkas, Supervisor, Waterbury Visiting Nurses Association

Henry J. Tiedemann, Jr., District Manager, Social Security Administration, and his associates, C. Anthony Marafino and Michael Giacondino

Thomas Hogenauer, Manager, Connecticut State Employment Service, and his associate, Ruth Mitkowsky

Genevieve Ramsey, Assistant Librarian, Silas Bronson Library

Myrtle Babcock, Executive Director, Waterbury Nutrition Council

Geraldine Novotny, University of Connecticut

James E. Moran, Assistant Superintendent, Waterbury Department of Education

James J. Donahue, Executive Director, Housing Authority, City of Waterbury

Fred W. Wilson, Manager, Employee Activities, Scovill Manufacturing Company

Appendix C

OCCUPATIONS OF PARTICIPANTS
IN THE DEMONSTRATION AND PRACTICE PROGRAMS

Occupations	Demonstration Group (n-15)	Practice Group (n-14)	Both Groups (n-29)
Application Analyst	1	-	1
Assembler	2	-	2
Crane Operator	-	1	1
Electrician	1	1	2
Floorman	-	1	1
Housewife	1	2	3
Machinist	-	4	4
Machine Designer	-	1	1
Motor Transport Operator	1	-	1
Pipefitter	1	-	1
Press Operator	1	-	1
Sales Manager	1	-	1
Slitter Helper	1	-	1
Timekeeper	1	-	1
Tool Grinder	2	-	2
Tool Inspector	-	1	1
Tool Maker	1	-	1
Tool Setter	1	1	2
Trailer	-	1	1
Unknown	-	1	1

Appendix D

The Human Relations Committee
UAW Local 1604 - Scovill Manufacturing Company

LEADERSHIP TEAM TRAINING PROGRAM
IN RETIREMENT EDUCATION

September 21 - October 2, 1964
Waterbury, Connecticut

THE ORIENTATION PHASE

			Program Personnel
September 21 - Monday			
A.M.	9:00	Preworkshop Questionnaire	
	9:30	Introduction to the Workshop	M. Burrall, R. Daddesiio
	9:50	Content and Methods of the Workshop	W. W. Hunter
	10:15	Intermission	
	10:30	Group Reaction to Plans and Methods for the Workshop	
	11:00	The Health and Physical Aspects of Aging	R. W. Butler, M.D.
	11:45	Group Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	The Psychological and Social Aspects of Aging	W. W. Hunter
	2:30	Group Discussion	
	2:45	The Economic Status of Older People	C. A. Marafino, R. Daddesio, W. W. Huniter
	4:00	Intermission	
	4:15	Group Discussion	
	5:00	Adjournment	
September 22 - Tuesday			
A.M.	9:00	Retirement Education--Objectives, Content and Methods	W. Hunter
	10:15	Group Discussion	
	10:30	Intermission	
	10:45	Learning and Decision-Making Through Group Discussion: A Practical Demonstration of How It Works	W. W. Hunter
	12:00	Luncheon Meeting	
P.M.	1:30	Materials for Retirement Education Programs	W. W. Hunter
	2:15	Group Discussion	
	2:30	Local Resources for Program Development: A Panel Discussion	W. W. Hunter, Moderaitor
		J. Donahue, C. A. Marafino, T. Hogenauer, J. Moran, L. Wilkas, R. Palladino, G. Ramsey	

September 22 - Tuesday (cont'd)

P.M.	3:45	Intermission	
	4:00	Preparation for the Demonstration and Practice Phases	W. W. Hunter
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session I	

THE DEMONSTRATION AND PRACTICE PHASES

September 23 - Wednesday

A.M.	8:30	Demonstration Session I[1] - Work and Retirement	Discussion Leader, W. W. Hunter
	10:30	Preparation of Committee Reports	
		a. Program arrangements	C. Rietdyke, Ch.
		b. Leadership skills and member participation	J. Fogarty, Ch.
		c. Program materials	J. A. Rompre, Ch.
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	Practice Session II[2] - Work and Retirement	Discussion Leader, A. Rompre Co-Leader, J. Fogarty
	3:30	Preparation of Reports by Committees and Staff	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session II	

September 24 - Thursday

A.M.	8:30	Demonstration Session II - Physical and Mental Health	Leader, W. W. Hunter Resource Persons: L. Wilkas R. W. Butler, M.D.
	10:30	Preparation of Committee Reports	
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	Practice Session II - Physical and Mental Health	Leader, J. Burke Co-Leader, R. Daddesio Resource Persons: L. Wilkas R. W. Butler, M.D.

[1]The Demonstration Sessions will be conducted by the Workshop staff.

[2]The Practice Sessions will be conducted by participants in the Workshop.

September 24 - Thursday (cont'd)

P.M.	3:30	Preparation of Reports by Committees and Staff	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session III	

September 25 - Friday

A.M.	8:30	Demonstration Session III - Family, Friends, and Living Arrangements	Leader, W. W. Hunter Resource Persons: J. Donahue M. Hayes
	10:30	Preparation of Committee Reports	
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	Practice Session III - Family, Friends, and Living Arrangements	Leader, M. Hayes Resource Person: J. Donahue
	3:30	Preparation of Reports by Committees and Staff	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session IV	

September 28 - Monday

A.M.	8:30	Demonstration Session IV - Financial Planning	Leader, W. W. Hunter Resource Persons: T. Haganauer C. A. Marafino
	10:30	Preparation of Committee Reports[1]	
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
	1:30	Practice Session IV - Financial Planning	Leader, A. Conti Co-Leader, H. Eastwood Resource Persons: T. Haganauer C. A. Marafino
	3:30	Preparation of Reports by Committees and Staff	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session V	

[1]Membership in the program arrangements, leadership skills, and program materials committees changed for Sessions IV through VI.

September 29 - Tuesday

A.M.	8:30	Demonstration Session V - Legal Affairs of Older People	Leader, W. W. Hunter Resource Person, J. Moore
	10:30	Preparation of Committee Reports	
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	Practice Session V - Legal Affairs of Older People	Leader, C. Rietdyke Co-Leader, L. Bernier Resource Person, J. Moore
	3:30	Preparation of Reports	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	
	7:30	Committee Work: Preparation for Session VI	

September 30 - Wednesday

A.M.	8:30	Demonstration Session VI - Leisure Time	Leader, W. W. Hunter Resource Persons: J. Moran R. Palladino G. Ramsey
	10:30	Preparation of Committee Reports	
	11:00	Committee Reports and Discussion	
	12:00	Luncheon Meeting	
P.M.	1:30	Practice Session VI - Leisure Time	Leader, R. Palladino Co-Leader, J. M. Burrall Resource Persons: J. Moran G. Ramsey
	3:30	Preparation of Reports	
	4:00	Committee Reports, Staff Evaluation and Group Discussion	
	5:00	Adjournment	

PROGRAM DEVELOPMENT PHASE

October 1 - Thursday

A.M.	8:30	Requirements for Successful Planning at the Local Level	W. W. Hunter
	9:30	Resources for Program Development	Panel Discussion
	10:30	Group Discussion	
	11:00	Committee Work on Program Development	

October 1 - Thursday (cont'd)

P.M.	1:30	Committee Work on Program Development (cont'd)	
	3:30	Post-workshop Questionnaire	
	4:00	Group Discussion: Program Development[1]	
	5:00	Adjournment	
	7:00	Dinner and Social Period	

October 2 - Friday

A.M.	8:30	Group Discussion: Program Development	
	11:00	Methods of Program Evaluation	W. W. Hunter
	12:00	Luncheon Meeting	

WORKSHOP EVALUATION PHASE

P.M.	1:30	Group Discussion: Program Development
	2:30	Reports on Results of Workshop
	4:30	Summary and Workshop Adjournment

[1]In this and subsequent sessions on program development the group undertook to review complete plans of action for each session of the retirement education program.

Appendix E

Schedule for Demonstration and Practice Programs

The Human Relations Committee
of
Scovill Manufacturing Company
and
The United Auto Workers, Local 1604

presents

L O O K I N G F O R W A R D T O R E T I R E M E N T

its first preparation for retirement program
for
employees of the Waterbury Divisions

Conducted by

Woodrow W. Hunter
Division of Gerontology, The University of Michigan
and
Leaders from Local 1604 and the Company

September 23.....Work and Retirement--Introduction
24.....Physical and Mental Health
25..Family, Friends, and Living Arrangements
28.....Financial Planning
29.....Legal Affairs of Older People
30..The Good Use of Leisure Time and Summary

Waterbury, Connecticut
1964

P R O G R A M

Session and Title	Content	Booklets and Short Stories	Resource People
1. Work and Retirement-- Introduction (September 23)	What to expect from the program. What it means to change from a work to a retirement way of life	Introduction to the Program. Work and Retirement. The Fourth Event* It's Not Easy to Sleep Late* The Retirement Readiness Checklist.	_____ Lindsay, _____ _____
2. Physical and Mental Health (September 24)	What can the older person do to prevent sickness and disability? When illness strikes, where can one get help? What contributes to good mental health?	Good Health in Retirement. Mental Health in Retirement. One Nice Sunny Morning* To Be Proud, To Be Old* Old Man Minich Knows, or Does He?*	
3. Family, Friends, and Living Arrangements (September 25)	Do husband-wife relations change during retirement? What is the importance of maintaining friendships in the later years? How do older people decide on the best place to live after retirement?	Family and Friends in the Later Years. Where to Live After Retirement. The Experiment in Loneliness* Goodbye, Green Knolls* It Happened to Carl Burns*	James Donahue, _____ _____
4. Financial Planning (September 28)	How much money will there be to live on after retirement? What can the retired person do to make ends meet?	Financial Planning for the Retirement Years. Earning Some Money in Retirement. A Cowboy Suit for Tad*	Thomas Haganauer, _____ _____ Marafino, _____
5. Legal Affairs of Older People (September 29)	What is the purpose of making a will? What happens in Michigan when there is no will?	Legal Affairs of the Older Person.	John Moore, Attorney and Manager, Labor Relations, Scovill Manufacturing Company
6. The Good Use of Leisure Time Summary (September 30)	Are there useful things to do with one's time after retirement? Can leisure time activities mean as much as job activities? Skills and hobby show.	Activity for the Retirement Years. Time: Friend or Foe* The Retirement Readiness Checklist.	James Moran, Superintendent, Waterbury Public Schools Rocco Palladino, Exec. Director, Waterbury Area Retired Workers Council _____ Ramsey, _____

*From the booklet titled When Tomorrow Becomes Today.

Appendix F

WORKSHEET
FOR
LEADERSHIP SKILLS AND MEMBER PARTICIPATION COMMITTEE

Date _____

Name _____

The purpose of this worksheet is to help you organize your observations of the discussion leader, the manner in which he conducted the meetings, techniques which he used and results he achieved, and, also, to help you organize your observations of the manner in which the members of the group participated in the discussion, and the changes that took place one meeting to another.

What to Observe	Your Evaluation
I. Preparation for the Meeting	
1. Were the people seated so they could talk to each other easily?	_____
2. Was the comfort of members considered from the standpoint of lighting, acoustics, temperature, distracting noise, stairs and bathroom facilities?	_____
3. Had the leader prepared for the meeting?	
a. Knew something about members.	_____
b. Had objectives clearly in mind.	_____
c. Was able to clearly state objectives.	_____
d. Had a discussion plan in mind.	_____
II. Opening the Meeting	
1. What was done to welcome members?	_____
2. Were members introduced to each other and were they encouraged to learn each other's name? How?	_____
3. What about the length and content of the introduction?	_____
4. Did it create interest and anticipation?	_____
5. Did the leader give members the opportunity to express expectations and interests?	_____
III. Developing Discussion	
1. What techniques did the leader use to develop discussion?	_____
2. Did the leader succeed or fail to stimulate discussion? Why?	_____

What to Observe	Your Evaluation
3. How did the leader behave toward members?	
a. Friendly or reserved.	
b. Domineering or democratic.	
c. Rejecting or accepting.	
d. Humorously or seriously.	
e. Calmly or nervously or insecure.	
f. Understandingly or lacking in understanding.	
g. Willing to listen or did all the talking himself.	
h. Appeared to like members or didn't like them.	
i. Respected members or showed disrespect.	
j. Talked down to group.	
IV. Quantity of Discussion	
1. How many pre-retirees were at the meeting?	
2. How many different pre-retirees took part in the discussion	
V. Quality of Discussion	
1. Did the discussion flow back and forth within the group?	
2. Was the discussion primarily between leader and individual members?	
3. How did the members react to the leader?	
4. How did members react to each other?	
5. Did some member(s) monopolize the discussion?	
6. What did you observe about the non-talkers?	
7. Do you think the members learned anything from the discussion?	
8. Were members satisfied with their part in the meeting?	
9. Did any of the members initiate discussion on their own?	
10. Did members of the group discipline each other?	
11. Did the members stay on the topic?	
12. Did the members seem relaxed?	

What to Observe	Your Evaluation
VI. Closing the Meeting	
1. Did the leader summarize the meeting?	_____
2. Did he prepare members for the next meeting?	_____
3. Did the members appear eager to come to the next meeting?	_____
4. What was done to create anticipation for the succeeding meetings?	_____
VII. General Observations	
A. From the standpoint of the leadership:	
1. What were the weak points of this meeting?	_____
2. What do you think were the strong points?	_____
3. What improvements would you suggest making at the next meeting?	_____
4. Did the leader appear to learn anything from results of previous meetings?	_____
B. From the standpoint of member participation:	
1. What were the weak points of this meeting?	_____
2. What were the strong points?	_____
3. How would you improve member participation at the next meeting?	_____
4. Was participation at this meeting different from participation in previous meetings?	_____

Appendix G

WORKSHEET
FOR
PROGRAM ARRANGEMENTS COMMITTEE

Date _____

Name _____

The purpose of this worksheet is to help you organize your observations and reactions to the physical and social arrangements for the meeting.

What to Observe	Your Evaluation
I. Physical Facilities and Arrangements	
1. Did everything appear in readiness for the meeting?	_____
2. What type of seating arrangements was employed?	_____
3. What was done, if anything, to increase the physical comfort of the group members?	_____
4. Was lighting adequate for purposes of the meeting?	_____
5. Was the room temperature satisfactory?	_____
6. Were there any distractions during the meeting?	_____
7. Was the meeting room easy for the members to locate?	_____
8. Did the older people have any difficulty entering or leaving the building?	_____
9. Was the room decor pleasing?	_____
10. Were drinking and toilet facilities easily accessible?	_____
II. Social Arrangements	
1. What procedures were used to welcome the group members?	_____
2. What was done to acquaint participants with each other?	_____
3. Did the participants wear name badges? How legible were the badges?	_____
4. What was done to encourage socialization among the participants?	_____
5. What evidence was there that the members were becoming acquainted?	_____
6. Were some participants more reluctant than others to become better acquainted?	_____

Appendix H

WORKSHEET
FOR
PROGRAM MATERIALS COMMITTEE

The purpose of this worksheet is to help you identify and assess the various kinds of materials which were used during the meeting.

I. Program Materials

1. What types of materials were employed? (List the different kinds of materials and evaluate the use of each of them.)

a. _____

_____

b. _____

_____

c. _____

_____

d. _____

_____

e. _____

_____

_____

2. What methods were used relative to the various kinds of materials? _____

3. What evidence was there during the meeting that the participants were interested in the materials? _____

4. What evidence was there that the materials provoked discussion? _____

5. What other kinds of materials could have been used effectively during the meeting? _____

Appendix I

WORKSHEET
FOR
OBSERVING ACTIVITY PROGRAM

What to Observe	Your Evaluation

I. THINGS
1. What are the physical arrangements?

2. What kinds of equipment are available?

3. What about accessibility, lighting, washroom facilities, etc.?

4. What is the general atmosphere of the meeting place--appearance, decor, etc.?

II. THE PEOPLE
1. Age of the members.

2. What is the sex composition of the group?

3. What is physical status of the members?

4. Marital status of members.

5. To what social strata do members belong?

6. Occupational background of members.

7. What general appearance (dress, orderliness) do members make? Any differences between men and women?

III. LEADERSHIP
1. Is the program supervised by paid leadership?

2. To what extent do members serve in leadership roles?

3. What type(s) of leadership is given to group? (Evaluate the leader(s).)

IV. THE PROGRAM
1. Describe following aspects of the program:

a. Objectives.

b. Frequency.

c. Program content.

What to Observe | Your Evaluation

d. Financial support.

e. Reactions of members (how they feel about the program).

f. Formal or informal organization.

g. Fees or dues.

V. THE GROUP

1. Describe the following aspects of the group:

a. Participation of members.

b. Group cohesiveness.

c. Mutual assistance among members.

d. Friendship patterns.

e. Isolates in the group.

VI. RELATIONSHIP OF PROGRAM TO COMMUNITY

1. Is the community informed about the program?

2. Is there informal and official sanction?

3. Is the community (group or individuals) concerned about continuity of the program?

4. Who in the community shares responsibility for the center and its program?

Appendix J

Preworkshop Questionnaire

Part I General Information

1. Your Name_____ 2. Address_____

3. Organization_____

4. Occupation_____

5. Age_____ 6. Sex: Male____ Female____

7. Does your job involve working with or for older people at the present time?

_____Yes (Specify_____)
_____ No

8. What kinds of benefits do you expect to obtain from participation in this workshop? (List in order of importance.)

a. _____

b. _____

c. _____

d. _____

Part II Self-Evaluation of Leadership Skills

Instructions: The following statements refer to how well prepared you think you are in various aspects of organizing and conducting a preretirement education program.

Read each statement and check the extent to which you agree or disagree with the statement. Make only one check for each statement. Please be perfectly frank in your replies.

1. I am able to plan and organize a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

2. I know how to promote attendance of older people in a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

3. I know the differences between a good and a poor discussion leader.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

4. I will be a better preretirement education discussion leader after I take part in the leadership training workshop.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

5. I am adequately prepared to serve as the discussion leader for a preretirement education program.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

6. I am familiar with several discussion topics for various sessions of a preretirement education program.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

7. I know ways to judge whether or not a group discussion meeting was a success.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

8. I know how to encourage group discussion.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

9. I am familiar with materials for use in a preretirement education program.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

10. I am familiar with different kinds of reference material which supplies information about older people.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

11. I know the best ways to set up a room to encourage group discussion.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

12. I know the different kinds of community leaders and officials who can be used as resource people in a preretirement education program.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

13. I think my organization (or community) should offer a preretirement education program.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

14. I have some ideas of how to go about promoting a preretirement education program among leaders in my organization or community.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

15. I have a working knowledge of specific visual aids that can be used in preretirement education programs.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

16. I know how to use retired people as resource people in a discussion program for preretirees.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___.

17. I can plan and conduct a "role-playing" session as part of a discussion program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

18. I am familiar with things that can be done to maintain good attendance in a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

19. I know how to organize an exhibit of crafts, hobbies, and interests as part of a preretirement discussion program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

20. I am familiar with the various techniques for evaluating results of preretirement education programs.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

21. I intend to see to it that my organization (or community) offers a preretirement education program for older people.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

22. I expect to serve as the discussion leader for a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

Part III. Your Choice of a Discussion Leader

Instructions: Assume that you are responsible for organizing a preretirement education program and for selecting a discussion leader for it. Look over the enclosed list of workshop members and select the person who would be your first choice. Who would be your second choice? Who would be your third choice? Write their names below.

First: _____

Second: _____

Third: _____

Appendix K

Postworkshop Questionnaire

Part I General Information

1. Your Name_____ 2. Address_____

3. Your Organization_____

4. What are the things you liked most about the workshop? _____

_____

_____ Don't know_____

5. What are the things you liked least about the workshop? _____

_____

_____ Don't know_____

6. What do you recommend be done to improve the workshop? _____

_____ _____

_____

_____

_____

7. Judging from what you got out of the workshop, do you think it should be offered t other groups?

Yes_____ No_____ Don't know_____

8. After attending this workshop, do you have a better understanding of older people nd the situations they are likely to face after retirement?

No_____ Yes_____ In what way? _____

_____

9. Do you personally feel any different about older people and retirement as a resul of participating in the workshop?

No_____ Yes_____ In what way? _____

_____

10. Did you read the materials that were handed out?

Yes_____ No_____

11. How much of the material did you read?

All or almost all of it. _____
About half of it. _____
Some but not half of it. _____
None of it. _____

12. Do you think the materials will be helpful if you undertake a preretirement education program for older people?

Yes_____ No_____ Don't know_____

13. Do you think the demonstration meetings were too long or too short?

Too long_____ Too short_____ Just right_____

14. If you had it to do all over again, would you take the time to come to a training program like the one we have just completed?

Yes_____ No_____ Don't know_____

15. Are you interested in obtaining additional training in preretirement education in a follow-up program?

Yes_____ No_____ Don't know_____

Part II <u>Self-Evaluation of Leadership Skills</u>

Instructions: The following statements refer to how well prepared you think you are in various aspects of organizing and conducting a preretirement education program.

Read each statement and check the extent to which you agree or disagree with the statement. Make only one check for each statement. Please be frank in your replies.

1. I am able to plan and organize a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

2. I know how to promote attendance of older people in a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

3. I know the differences between a good and a poor discussion leader.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

4. I am a better preretirement education discussion leader now that I have participated in the leadership training workshop.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

5. I am adequately prepared to serve as the discussion leader for a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

6. I am familiar with several discussion topics for various sessions of a preretirement education program.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

7. I know ways to judge whether or not a group discussion meeting was a success.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

8. I know how to encourage group discussion.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

9. I am familiar with materials for use in a preretirement education program.

   STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

10. I am familiar with different kinds of reference material which supplies information about older people.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

11. I know the best ways to set up a room to encourage group discussion.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

12. I know the different kinds of community leaders and officials who can be used as resource people in a preretirement education program.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

13. I think my organization (or community) should offer a preretirement education program.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

14. I have some ideas of how to go about promoting a preretirement education program among leaders in my organization or community.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

15. I have a working knowledge of specific visual aids that can be used in preretirement education programs.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

16. I know how to use retired people as resource people in a discussion program for pre-retirees.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

17. I can plan and conduct a "role-playing" session as part of a discussion program.

    STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

18. I am familiar with things that can be done to maintain good attendance in a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

19. I know how to organize an exhibit of crafts, hobbies, and interests as part of a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

20. I am familiar with the various techniques for evaluating results of preretirement education programs.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

21. I intend to see to it that my organization (or community) offers a preretirement education program for older people.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

22. I expect to serve as the discussion leader for a preretirement education program.

STRONGLY AGREE___ AGREE___ UNCERTAIN___ DISAGREE___ STRONGLY DISAGREE___

Part III <u>Your Choice of a Discussion Leader From Among Workshop Members</u>

Instructions: Assume that you are responsible for organizing a preretirement education program and for selecting a discussion leader for it.

Look over the enclosed list of workshop members and select the person who would be your <u>first choice</u>. Who would be your <u>second choice</u>? Who would be your <u>third choice</u>? Write their names below.

First: _____

Second: _____

Third: _____

Part IV Trainee Evaluations of Other Trainees

Instructions: At one time or another during the program you had the opportunity to observe the following workshop members serving as discussion leaders, reporters, panelists or resource people. What is your over-all evaluation of the kind of job each of them did? Check one rating for each trainee except yourself.

Workshop Member	Excellent	Good	Fair	Poor	No Opportunity to Observe